

Where  
do I Start?



# Investment Tools @ Your Library

City of Mesa Library

## Investment Tools @ Your Library

Are you a beginning, intermediate, or advanced investor wanting to make sound investment decisions? These tools will help you gather the latest investment and economic news and advice. Expand your knowledge of trends and techniques and make the most of your time and money with these resources.

Also try websites linked from the Library's webpage, and our lending collection:

- Investment How-to's
- Investment analysis (fundamental, technical including candlestick and other charting methods)
- Advice from investment gurus
- Credit, Personal Finance
- Real Estate
- Other wealth-building strategies

Most tools are reference, for use in library only. All other materials require valid City of Mesa library card for checkout.

## Investment Research Tools

### Stocks

**Morningstar Investment Research Center – *Electronic Database accessible with City of Mesa Library card and PIN.***

Research stocks, mutual funds, ETFs, and industries. Offers tools for comparing investments in a portfolio, plus educational tools.

**Value Line Investment Survey. Weekly.** MN (request index 2<sup>nd</sup> floor desk), DR, RM  
Data/performance on approximately 1700 stocks in 97 industries. Large-cap, small/mid-cap stock information and investment analysis. Ratings and Reports are 1-page reports on companies. Series includes reports on economy.

**Standard & Poor's Stock Reports.** Monthly. MN, DR, RM Comprehensive 2-page reports on approx. 3,000 companies traded on national exchanges and OTC market.

**Standard & Poor's/Trendline Current Market Perspectives.** Monthly. MN, DR, RM

Charts of 1500 stocks in the S&P Indexes: S&P 500, MidCap 400, and SmallCap600.

### Mutual Funds & Other Issues

**Morningstar Investment Research Center – *Electronic Database*** (Read about this resource under "Stocks" section)

**Morningstar Mutual Funds.**

Semimonthly. MN, DR, RM

Data on more than 10,000 mutual funds with ratings.

**Standard & Poor's Stock Guide.**

Monthly. MN, DR, RM

Also called Security Owner's Stock Guide; presents financial data on more than 7,000 issues including cover-preferred closed-end funds, Mutual Funds and Variable Annuity/Life Investments.

### Bonds

**Standard & Poor's Bond Guide.**

Monthly. MN, DR, RM

Most pertinent comparative financial/statistical information on a broad list of bonds – over 7,700 – including over 6,800 domestic corporate bonds, more than 560 Canadian and foreign issues, 320 convertible bonds.

### Commodities

**CRB Commodity Yearbook.** Annual. MN  
Crucial information on more than 100 domestic and international commodities—from aluminum to zinc—includes seasonal patterns and historical data from past ten years and current (as of the last three months) pricing and trading patterns on monthly and annual basis.

### **CRB Price Charts.** Weekly. MN

Technical analysis of the markets, including daily and weekly bar charts displaying open, high, low and settlement prices for commodities (including metals and foreign currency).

## **Companies & Industries**

### **EDGAR (SEC filings)**

All public companies must report to SEC. Filings can be obtained in several ways (Library Databases have many value-added features):

- **EDGAR Website:**  
www.sec.gov/edgar.shtml
- **Reference USA Library Database:**  
Via library website; look up company.
- **Business & Company Resource Center Library Database:**  
Via library website; look up company.
- **Hoover's Company Records Library Database:**  
Via library website; look up company.

### **Standard & Poor's Industry Surveys.**

Monthly. MN, DR, RM  
Analysis of 51 major industries.

### **Dow Jones Averages, 1885-1995.** MN

Historic averages.

## **Obsolete Stocks**

### **Directory of Obsolete Securities.**

Annual. MN Lists companies/banks whose orig. identities lost due to name change, merger, acquisition, dissolution, etc.

### **Robert D. Fisher Manual of Valuable and Worthless Securities (microfilm)** MN.

Dormant, inactive, reorganized, merged, liquidated, or dissolved corporations.

## **Investment Newsletters**

Advisor opinions on markets/ timing. Most at MN; check catalog for other holdings.

**REF** - holdings on 2nd floor; no copies check out:

### **The Chartist**

**Hulbert Financial Digest** Compares/tracks success of investment newsletters.

### **Dow Theory Forecasts**

### **DRIP Investor**

### **The Kiplinger Letter**

### **No Load Fund X**

### **The No-Load Fund Investor** (at RM only)

### **The Outlook – Standard & Poor's**

### **The Prudent Speculator**

**PER** - holdings in Periodicals area; back issues check out:

### **Futures**

### **Kiplinger's Retirement Report**

### **Louis Rukeyser's Wall Street**

### **Louis Rukeyser's Mutual Funds**

### **Outstanding Investments**

## **Newspapers/Magazines**

### **Arizona Business Gazette**

### **Barron's**

### **Business Journal (Phoenix)**

### **Business Week**

### **Economic Indicators (Gov. Pub.)**

### **The Economist**

### **Forbes**

### **Fortune**

### **Kiplinger's Personal Finance**

### **Money**

### **Smart Money**

### **Social Security Bulletin (Gov. Pub.)**

### **Stocks and Commodities**

### **U.S. News and World Report**

### **The Wall Street Journal (print/electronic)**

## **Learning about Investing**

Items arranged by Dewey numbers based on subject. You'll find overlap; explore entire collection:

332.024 Personal Finance

332.02401 Wealth-building, IRAs

332.024014 Retirement

332.6 General Investing

332.632 Investing How-To's

332.632042 Trading/Fund. & Tech. Analysis

332.6322 Stocks

332.63222 Charting

332.63228 Options

332.6324 Real Estate Investing

332.6327 Mutual Funds

332.645 Hedge Funds, Options, Day Trading

Updated 8/09

Sandra G. Rizzo, Business Librarian